



**Global Search v.5.0  
for Microsoft Dynamics CRM 2011  
Update Rollup 12 and newer**

**User Manual**

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## Overview

Welcome to the Akvelon Global Search User Manual. With this guide, you can learn how to install, configure, and use Akvelon Global Search for Microsoft Dynamics CRM 2011.

Global Search for Microsoft CRM 2011 is a custom module which allows you to search across all CRM entities at the same time, providing results in a single-view convenient layout.

Global Search provides the ability to:

- Search all records in all CRM entities (including custom entities) at once from inside the CRM workspace
- Search all records using the CRM plug-in within Microsoft Outlook
- View search results grouped by entities at a single glance
- Filter results in the column headers of each entity
- Configure entities to search, attributes to search by, and information to display
- Search the contents of an attachment
- Search custom entities (Search by Lookup fields)
- Export search results to Excel

# What's New in Global Search Versions

## Version 5.0.0

- Added support for Microsoft Dynamics CRM 2011 Update Rollup 12
- Added Cross-browser support
- Added ability to Export search results to Excel file
- Added highlighting keywords found in search results
- Added ability to search through Contract lines
- Fixed problem with Deactivated users which 'used' Global Search license
- Fixed sorting for search results
- Fixed some issues with Attachment search
- Fixed minor issues relate to UX

## Version 5.0.2

- Fixed sorting by Date and Time attributes in search results
- The newest items are displayed in search result when limit of found records is reached

## Version 5.0.3

- Fixed issue with caching of Global Search roles
- Improved Export to Excel feature
- Implemented ability to configure destination for Global Search Backend log files
- Implemented ability to Enable/Disable Global Search Backend logging
- Fixed minor issues

## Version 5.0.4

- Global Search Backend - fixed Repair function
- Added ability to search through Quote products and Order Products
- Added auto-expanding for entity's group if only one record is returned (see Auto-expand Entities in Search Results for more details)
- Added ability to insert search queries to the URL (?search='keyword')
- Fixed showing dialogs and pop-ups in Chrome v.37
- Fixed sorting for emails and notes to display newest records at the top of the search result
- Fixed Export to Excel feature

## Licensing

Whether you are using Microsoft Dynamics CRM 2011 in your production, development or test environment, you always need licenses.

Each organization requires its own license for Global Search. In a typical setup you have one single organization and only need one license. The license contains the organization name and you only can install the license on the organization with the specified name.

If you use multiple organizations, each organization requires a separate Global Search license. However, you only need licenses for the organizations using Global Search. If you have a single CRM server with 4 organizations and you want to use Global Search in two of them, then you need two licenses.

Each organization license (except the trial one) contains a restricted number of client user licenses (CAL). Each user of an organization that uses Global Search must have a valid license. If an organization has 100 users and 50 users have permissions to perform search using Global Search (see Global Search Users Permissions section), you need at least 50 Global Search licenses, otherwise you will receive a license validation error.

When adding new users to CRM, be sure to check that Global Search also has corresponding licenses for new users.

To request Global Search licenses please contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com).

## Installation

### Upgrading from previous Global Search versions for Microsoft CRM 2011 On-premise

To upgrade from Global Search 3.3.x you need to run Global Search 5.0 installer (Globalsearch\_x64.exe) and click **Update** button during installation wizard. To upgrade Global Search Backend you need to run Global Search Backend 5.0 installer (Globalsearch\_backend\_x64.exe ) and click **Update** button during installation wizard.

**Please note:**

1. Due to significant changes in this version of Global Search license data won't migrate from previous versions. Please [contact us](#) to get new license key.
2. We strongly recommend emptying the cache in the IE browser before working with the updated version of Global Search.

### Upgrading CRM 4.0 On-premise to CRM 2011 On-premise

Microsoft's Sure Step document recommends deactivating/removing all 3rd party solutions before upgrading from CRM 4.0 to 2011. Please completely remove Global Search before upgrading from CRM 4.0 to 2011. After upgrading, install appropriate version of Global Search to your CRM server (the latest version of Global Search can be downloaded from <http://akvelon.com>, Products menu).

**Please note:**

1. New license key for CRM 2011 is required, the license key for 4.0 doesn't support CRM 2011, please contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) for more details.
2. Global Search settings from CRM 4.0 will be lost.

### Moving CRM 2011 Online database to CRM 2011 On-premise (and vice versa)

Please completely remove Global Search before moving your CRM Online database to CRM 2011 On-premise server. After moving database, install appropriate version of Global Search to your CRM server (the latest version of Global Search can be downloaded from <http://akvelon.com>, Products menu).

**Please note:**

1. New license key for CRM 2011 On-premise is required, the license key for CRM Online doesn't support CRM 2011 On-premise (please contact [gs.support@akvelon.com](mailto:gs.support@akvelon.com) for more details).
2. Global Search settings from CRM Online will be lost.

## Global Search Installation

To set up Akvelon Global Search on Microsoft Dynamics CRM, follow these steps:

1. Log on to your Microsoft Dynamics CRM server using an account that has administrative privileges.
2. Allow pop-up windows in your web browser for CRM website:
  - Internet Explorer: <http://windows.microsoft.com/en-us/internet-explorer/ie-security-privacy-settings>
  - Google Chrome: <https://support.google.com/chrome/answer/95472?hl=en>
  - Mozilla Firefox: <https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting>
3. Run GlobalSearch\_5.0.x.exe as Administrator (right-click on the setup file and select "Run as Administrator").
4. Follow the installation wizard.
5. After installation, Global Search should be activated. An activation window for the CRM server **default organization** will open after installation. If you need to activate Global Search for a non-default organization you should open the activation page manually (see Activation section for more details).
6. Give search rights to users (see Global Search Users Permissions section).

## Attachment Search Installation

### Automatic installation

The Attachment Search is a feature which allows users to search the contents of an attachment in Microsoft CRM 2011 for the following file formats: .doc, .docx, .xls, .xlsx, .pdf, .ppt, .rtf, .txt, .xml, .pdf, and .zip.

To install this feature, please follow these steps:

1. Global Search should be installed and activated (please see Global Search Installation above).
2. Run Globalsearch\_backend\_x64.exe (for 64bit OS) **as Administrator** (right-click on the setup file and select "Run as Administrator").
3. Follow the installation wizard.

Enable attachment search feature (see

4. Configuring Attachment Search section)

**Please note: Global Search Backend should be installed on the computer with SQL Server where working copy of MSCRM\_Config database is located.**

### Manual installation (only for SQL Administrators)



Usually, this type of installation is required in case you are using Clustered SQL Server. Please read **Automatic installation** before installation.

1. Copy the “**GsBackend\_Installer\_Config.xml**” to the root of the System disk (e.g. **C:\**) and open the file in any text editor (you can download XML file [here](#)).
2. Edit the “**GsBackend\_Installer\_Config.xml**” with the following parameters:
  - List of SQL instance(s) (the same name, which you are using to enter to the SQL instance through the SQL Management Studio), for example:  
**CRM19144;CRM19144\CRM1914A;SCSQAASQL05\SCSQAASQL05**
  - Folder, where Crawler.exe will be located (you also can enter network folder, please note, that SQL instance should have permissions for that folder). Please enter full path to Crawler.exe file, for example: **C:\Crawler\Akvelon Global Search\Backend\Bin\** or [\\box\Crawler\Akvelon Global Search\Backend\Bin\](#)
3. Install Global Search Backend (please see the instruction above **Automatic installation**). It will be installed to the SQL instance(s) you entered in the XML file.
4. Move the “**Akvelon Global Search**” folder from **C:\Program Files (x86)\** to the folder you entered in the XML file (e.g. **C:\Crawler\Akvelon Global Search\Backend\Bin\**).

Enable Attachment search (please see

5. Configuring Attachment Search section).
6. Wait for the first execution of crawler.exe (it executes each 15 minutes).
7. Make sure that indexing is working for specified instances (try to search something in the content of attached documents).

## Activation

Activate Global Search separately for each organization.

First of all, **make sure that pop-ups are not blocked by your internet browser for your CRM site**. To activate Global Search for an organization, open the following page in your browser (activation page for server default organization will open when installation is complete): **[http\(s\)://CrmOrganizationAddress/ISV/Akvelon/GlobalSearch/Pages/Activator.aspx](http(s)://CrmOrganizationAddress/ISV/Akvelon/GlobalSearch/Pages/Activator.aspx)** (e.g.: <https://crmdemo2011.akvelon.net/ISV/Akvelon/GlobalSearch/Pages/Activator.aspx>).

On the activation page you will see the **End User License Agreement**, please read and accept it using the checkbox, then click the **Activate** button. Input your Global Search license into the open license window (see Figure 1) and click **OK**.

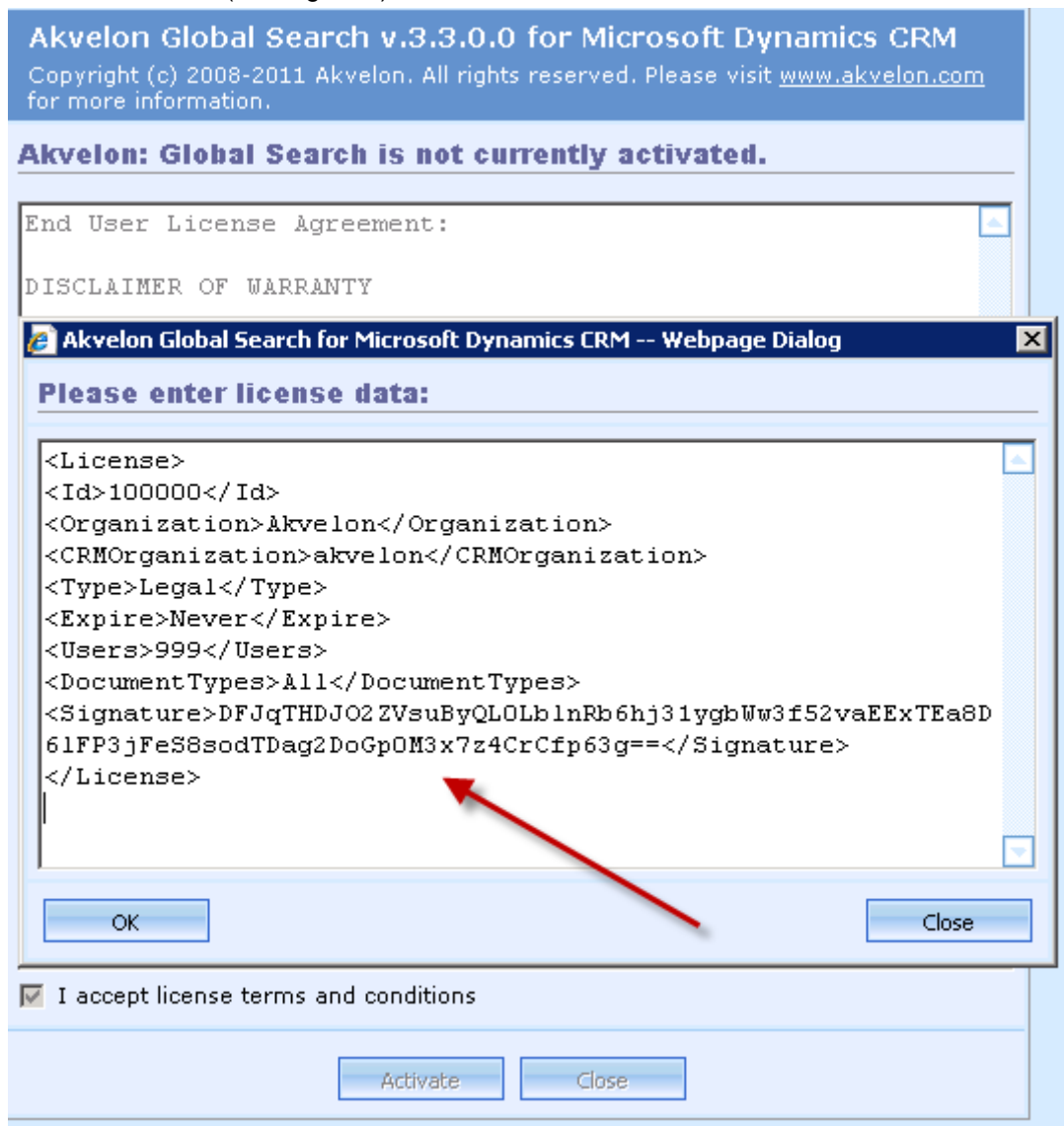


Figure 1 License window

The Akvelon Global Search configuration window will open (see Figure 2). Here you can select the tabs to add the Global Search links.

**Please note:** you should select at least one tab or you will not have the opportunity to use Global Search.

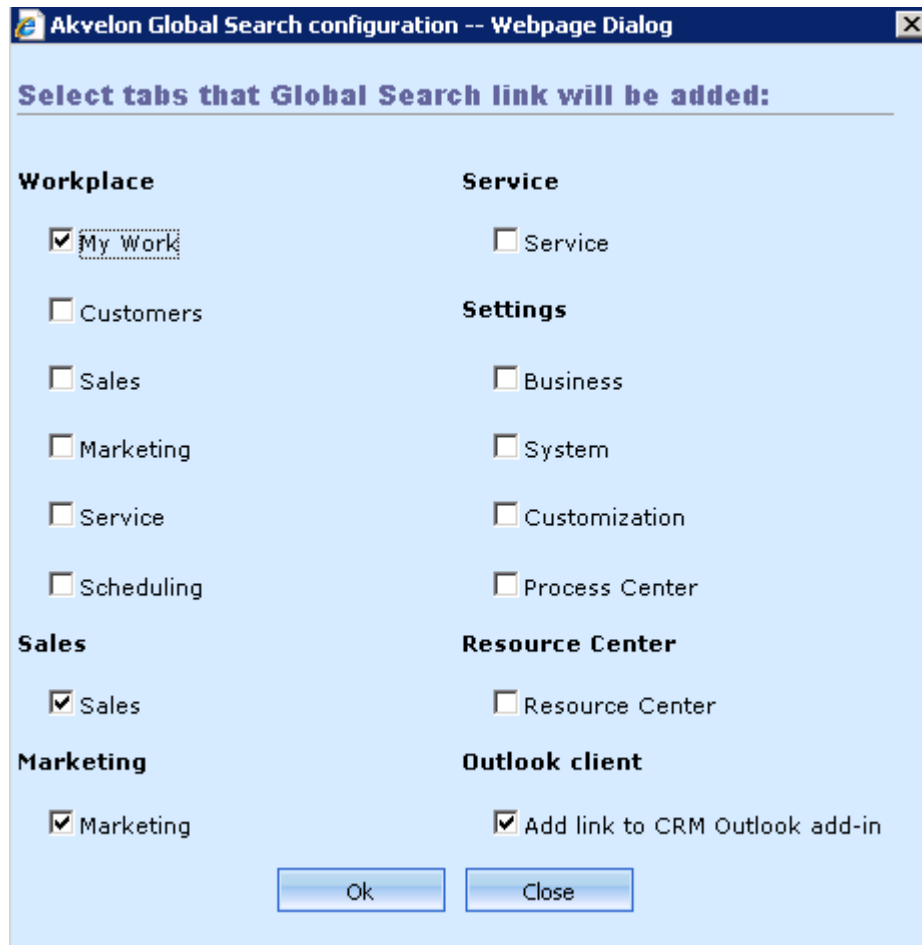


Figure 2 Select the tabs where you want to add the Global Search link

After you click Ok, a message that Global Search is activated will show. Now you can use the Global Search functionality.

## Updating License Data

If you need to update license data (e.g. to input commercial license instead of trial or update number of users) go to **Settings > Global Search Settings**, and click the **About** button at the upper right-hand corner. Then click the **Update license** button, put new license data into the license textbox (see Figure 3) and click the **Update license** button.

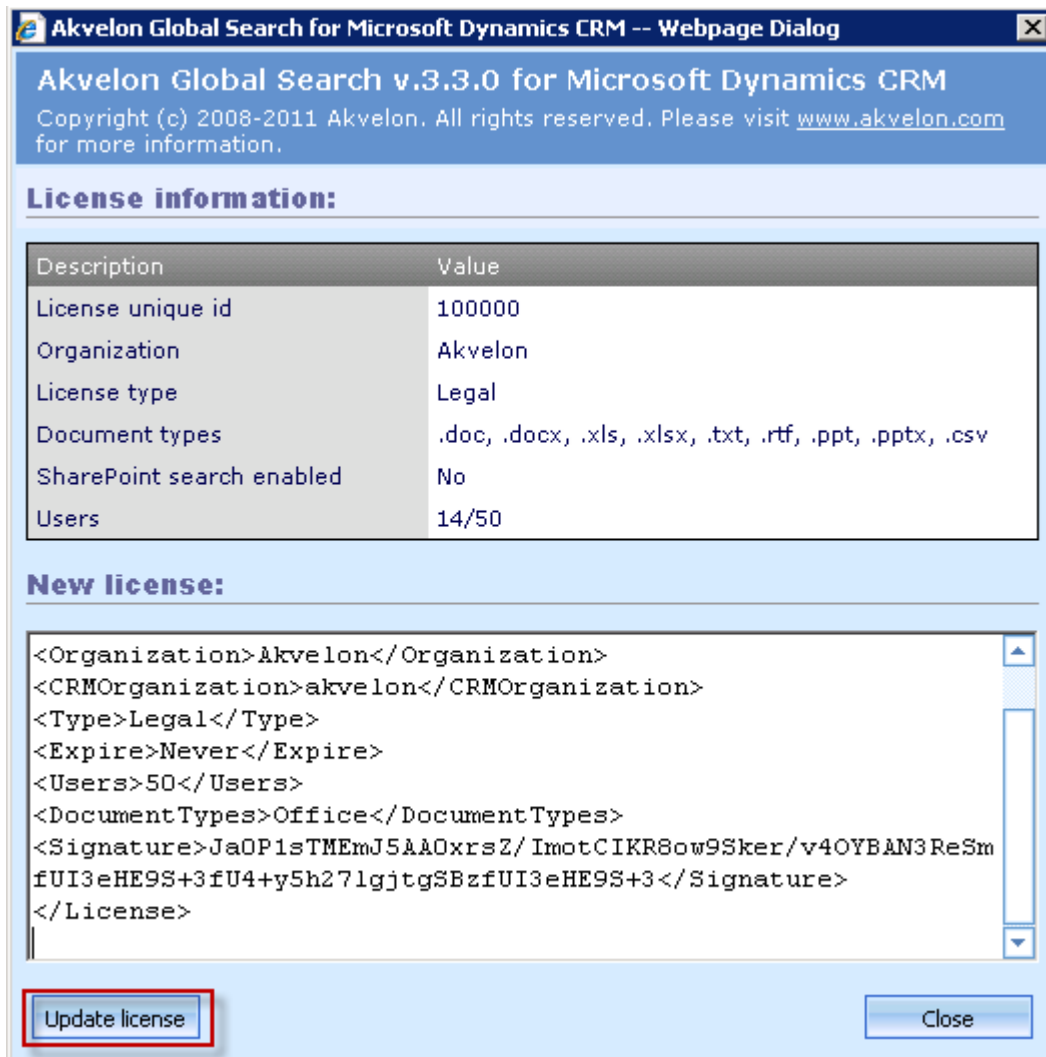


Figure 3 Update license window

## Global Search Settings Backup/Restore

All configuration settings of Global Search are stored inside the CRM database and do not require additional backup.

If you restore CRM from a backup to a new server you should install Global Search (please see Installation section). All activation, license and configuration data will be preserved.

In case you are going to Upgrade CRM 4.0 to 2011 or move your Database from CRM Online to CRM 2011 On-premise - please carefully read Installation section.

## Uninstall Global Search

1. Deactivate Global Search for **ALL CRM organizations** that have it enabled.

To deactivate Global Search go to **Settings > Global Search Settings** and click the **About** button at the upper right-hand corner. A window with license information will open (see Figure 4). Click the **Deactivate** button.

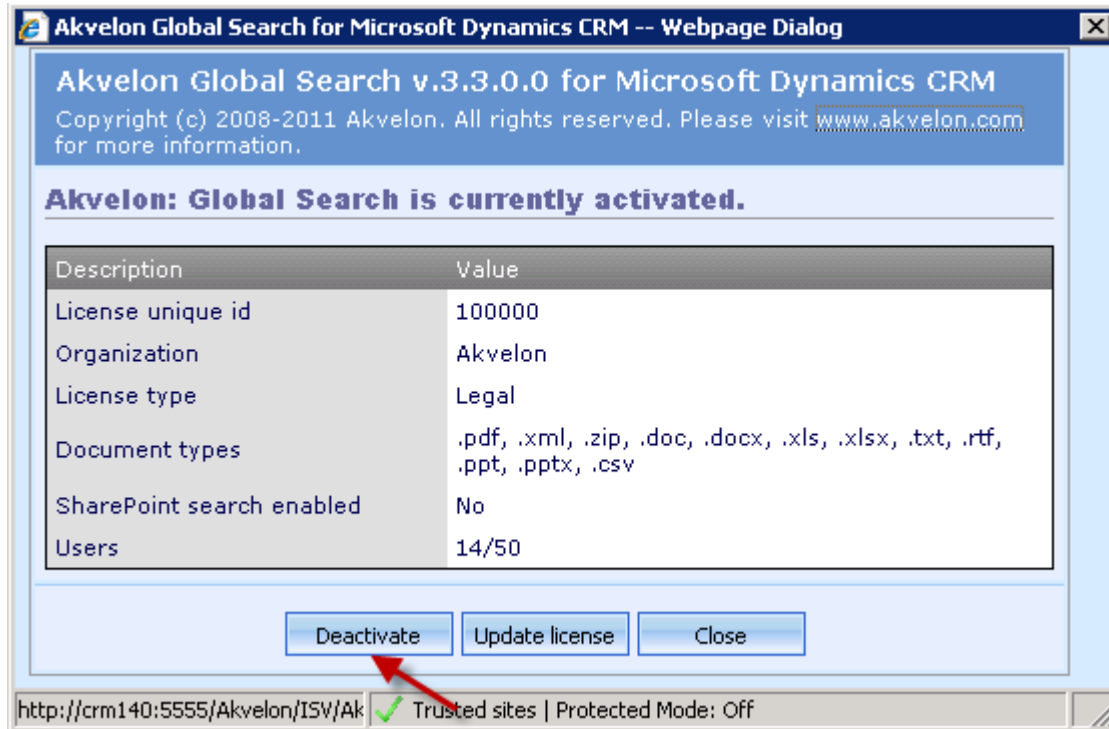


Figure 4 License information window

2. Uninstall Global Search using the “Add/Remove Programs” utility in the Microsoft Windows Control Panel (name in programs list: “Akvelon Global Search”), or using the Global Search installer.

## Uninstall Attachment Search

1. Disable the Attachment Search for ALL CRM organizations that have it enabled.

To disable **Global Search Attachments** go to **Settings > Global Search Settings** and click the **Attachment Search Configuration** button at the top menu. The **Attachment Search Configuration** window will open (see Figure 5). Uncheck the **Attachment Search Enabled** checkbox.


Attachment Search Configuration		
<b>Crawler status</b>		
Last Run Time:	6/3/2011 2:30:00 AM	
Last Run Result:	Succeeded	
Current Status:	Idle	
Next Run time:	6/3/2011 2:45:00 AM	
<b>Settings</b>		
<input checked="" type="checkbox"/> Attachment Search Enabled		
<b>Select document types to search in:</b>		
<input checked="" type="checkbox"/> Select All		
<input checked="" type="checkbox"/>	.doc	Available
<input checked="" type="checkbox"/>	.docx	Available
<input checked="" type="checkbox"/>	.xls	Available
<input checked="" type="checkbox"/>	.xlsx	Available
<input checked="" type="checkbox"/>	.ppt	Available
<input checked="" type="checkbox"/>	.pptx	Available
<input checked="" type="checkbox"/>	.rtf	Available
<input checked="" type="checkbox"/>	.txt	Available
<input checked="" type="checkbox"/>	.csv	Available
<input checked="" type="checkbox"/>	.xml	Available
<input checked="" type="checkbox"/>	.pdf	Available
<input checked="" type="checkbox"/>	.zip	Available

Figure 5 Attachment Search Configuration

2. Uninstall the Attachment Search using the “Add/Remove Programs” utility in the Microsoft Windows Control Panel (name in programs list: “Akvelon Global Search v.x.x Attachments Search”), or using the Attachment Search installer (Globalsearch\_backend\_x64.exe).

## Searching with Akvelon Global Search

Akvelon Global Search can search various data items (such as customers, accounts, activities and etc.) in a single query. Global Search 5.0 and higher includes cross-browser support. It means that you can use your favorite browser (IE, Chrome, Firefox or Safari) to search in Dynamics CRM.

To use the search, go to the tab where the Global Search link was added in the Microsoft Dynamics CRM application, and select **Global Search** link (see Figure 6). Type a word(s) into the search field and click the **Search** button  or press **Enter**.

After the search is complete you will see all entity groups found. If you expand any of them you will see the list of found records. To open a specified record, double click on it. Also, Global Search provides ability to highlight search keywords in search results (see Enable/Disable Highlighting Keywords section for more details).

Global Search supports two types of search views (choose view at the top-right corner):

- **All Items** – all items from all users (that user has access to) will be searched
- **My items** – only your items will be searched

Note: Entities and attributes that are searched and displayed can be configured in the Global Search Settings (for detailed information see Configuration section).

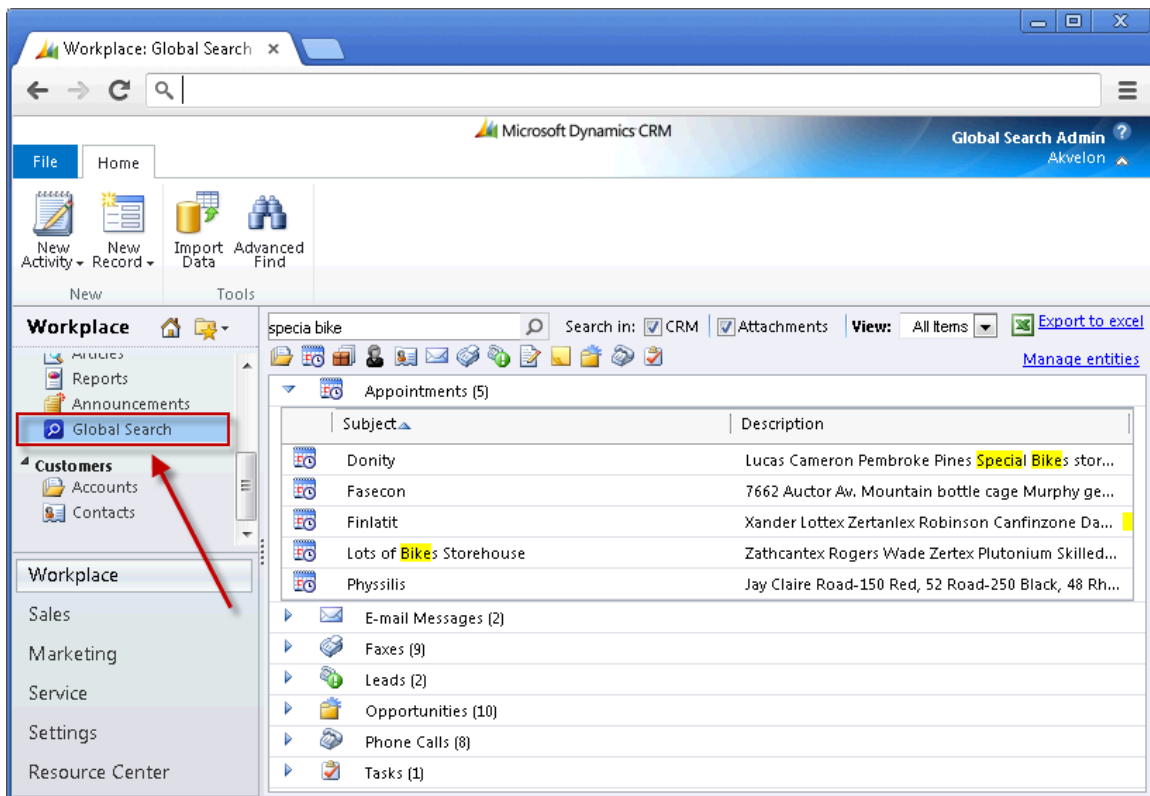


Figure 6 Global Search link and search field



## Search Logic

Global Search performs searches of strings in all entities and attributes configured in the Global Search Settings.

Global Search performs case-insensitivity searches by the word-beginning search principle.

For example if you search for “Book” you can find entities that contain “book”, “Books”, “BOOKSHELF”, but not “eBook”.

## Wildcard Search

You can use an asterisk (“\*”) as a character to represent one or more other characters. For example:

If you search for “**sa\*t**”, found values will start with “sa” and end with “t”, for example “**Salt**”, “**Saint**”, “**sacrament**” etc.

If you search for “**\*sam\***”, records with “sam” anywhere in the string will be found, for example “**sample**”, “**Samson**”, “**Grossam**”.

## Multiple Words Search

If several words are input, Global Search will find all records containing all of the words in their attributes (not obligatory in the same attribute).


For example if you search for “Jack London”, it will find a contact with name Jack London, and it will find all Jacks that have London in the “city” attribute (or in any other searchable attribute).

If you search for “Seattle Art Museum” it will find Accounts with the organization name “Seattle Art Museum” or contacts with city “Seattle” and “Art Museum” in description.

You can also use the asterisk symbol with Multiple Word Searches (see Wildcard Search section).

## Search the Contents of an Attachment

To make a search through attachment contents, type a word(s) into the search field, check

**Search in Attachment** and click the **Search** button  or press **Enter** (please ensure the Attachment Search is enabled, see the

Configuring Attachment Search for more details). Search logic for attachments are the same as for Global Search **except Wildcard search** (please see the Searching with Akvelon Global Search section). Wildcard doesn’t work for beginning and middle of search word. It works only for end of the word, for example, if you search for “**Tom**”, it will find the following: Tom, Tomato, Tomorrow, etc.

## Custom Entity Search

Global Search supports Custom Entity Searches (Search by Lookup fields).

Every entity form has a lookup field regarding another entity.

For example, the **Contact** entity can be related to the **Account** entity by the **Primary Customer** lookup field (please see Figure 7).

The screenshot displays the Akvelon Global Search interface for a Contact entity. The contact is named Miranda Valdez, with email address ultrices.sit@utpharetrased.com. The 'Parent Customer' field is highlighted with a red box, showing a lookup value of 'Liquid Street'. The interface includes a left sidebar with navigation options like General, Details, Notes & Activities, and Preferences. The top menu bar includes File, Contact, Add, and Customize. The bottom status bar shows Internet | Protected Mode: Off and 100% zoom.

Contact: Miranda Valdez	
E-mail	ultrices.sit@utpharetrased.com
Preferred Method of Contact	Any
Owner	First name Last name
<b>General</b>	
Salutation	Mrs.
First Name *	Miranda
Middle Name	
Last Name *	Valdez
Job Title	
Business Phone	1 12 185 3379-0756
Home Phone	
Mobile Phone	
Fax	
E-mail	ultrices.sit@utpharetrased.com
Parent Customer	Liquid Street
<b>Address</b>	
Address Type	
City	Seattle
Status	Active

Figure 7 Relationship between Contact and Account

To add required attributes, go to **Settings > Global Search settings**, select the entity, click **Edit Entity**. In **Attributes to Display** and **Attributes to search by** areas you can see customized attributes marked as **(lookup)** (please see Figure 8 ).

**"Contacts": Select fields to display and search by**  
Select columns from the list on the left that you would like Akvelon Global Search to display and use in search queries.

Attributes to display   Attributes to search by   States to search by   Relationships to display

Available attributes to search by

Last Name
Manager Phone
Manager
Marital Status
Middle Name
Mobile Phone
Modified By (Delegate) (Lookup)
Modified By (Lookup)
Nickname
Originating Lead (Lookup)
Owner (Lookup)
Pager
Payment Terms
Preferred Day
Preferred Facility/Equipment (Lookup)
Preferred Method of Contact
Preferred Service (Lookup)
Preferred Time
Preferred User (Lookup)
Price List (Lookup)
Role
Salutation
Spouse/Partner Name
Suffix
Telephone 3
Web Site
Yomi First Name

Selected attributes to search by

Address 1: City
Business Phone
Description
E-mail
Full Name
Job Title
<u>Parent Customer (Lookup)</u>

Add  
Remove  
Add all  
Remove all

Number of entity's attributes can affect the search speed (too many set value can slow down the search).

OK   Cancel

Figure 8 Search Lookup Settings

Add required attributes and click OK. The lookup fields are clickable. Related records will open by clicking the appropriate link (please see Figure 9).

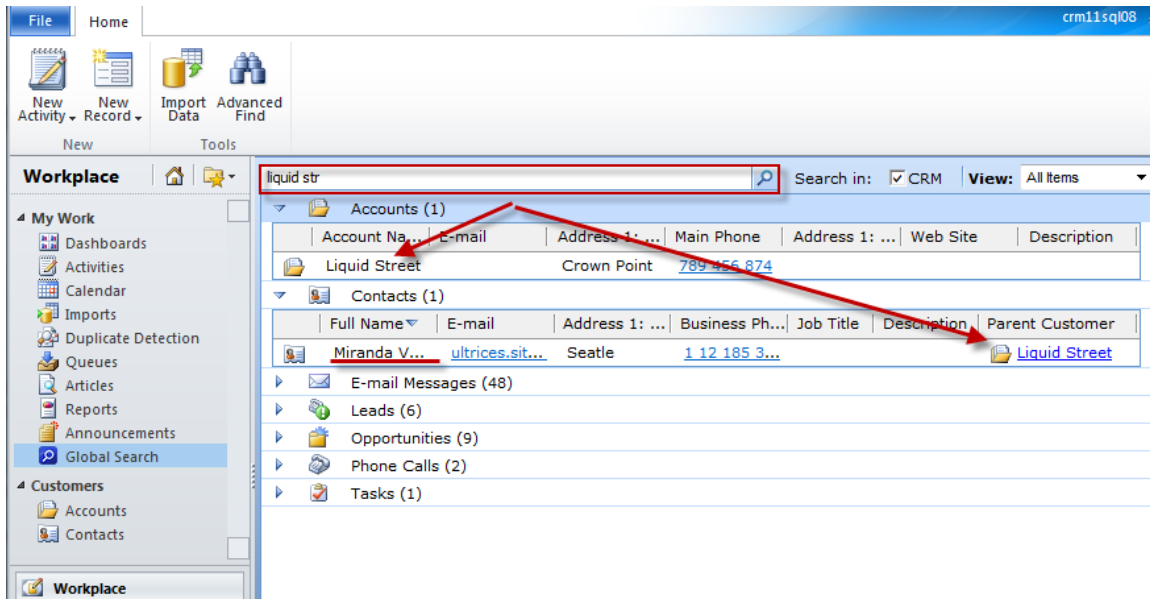


Figure 9 Search by Lookup Field

## Inside Column Filters and Sorting in columns

When more than five records are found in group, the additional column filters are shown. At the top of each column, there is a text box used to filter that specific column (see Figure 10). By typing in the text box, you can narrow the number of rows in the table down to those that match your filter text.

You can sort search results for each column by click on column name. You can select sort order (such as smallest to largest or largest to smallest) for each column you want to sort on.

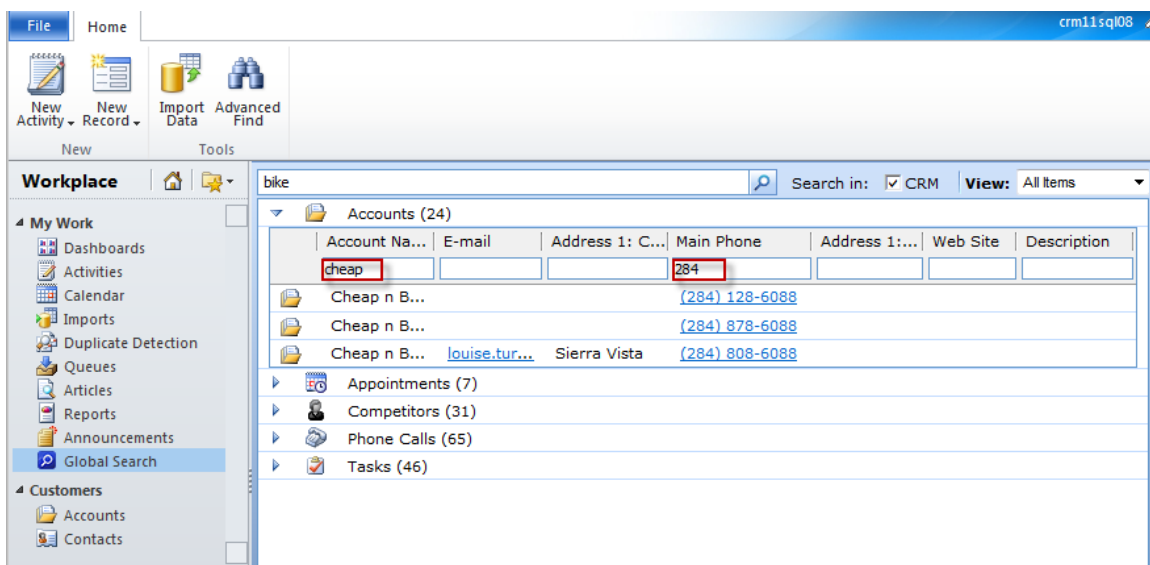


Figure 10 Inside column filters

## Export found data to an Excel static worksheet

This feature requires 'Export to Excel' privilege that can be set on security roles (open a security role, go to the Business Management tab and look under "Miscellaneous Privileges"). By default, an exported worksheet includes found records and fields that are displayed in the search results, using the same field order and sorting.

1. In the main Global Search window, click Export to Excel (see Figure 11).
2. In the Export Data to Excel dialog box, select entity which you want to export to Excel. Please note that CRM doesn't provide ability to export multiple entities at a time.
3. Click Export button > Open or Save Excel file.

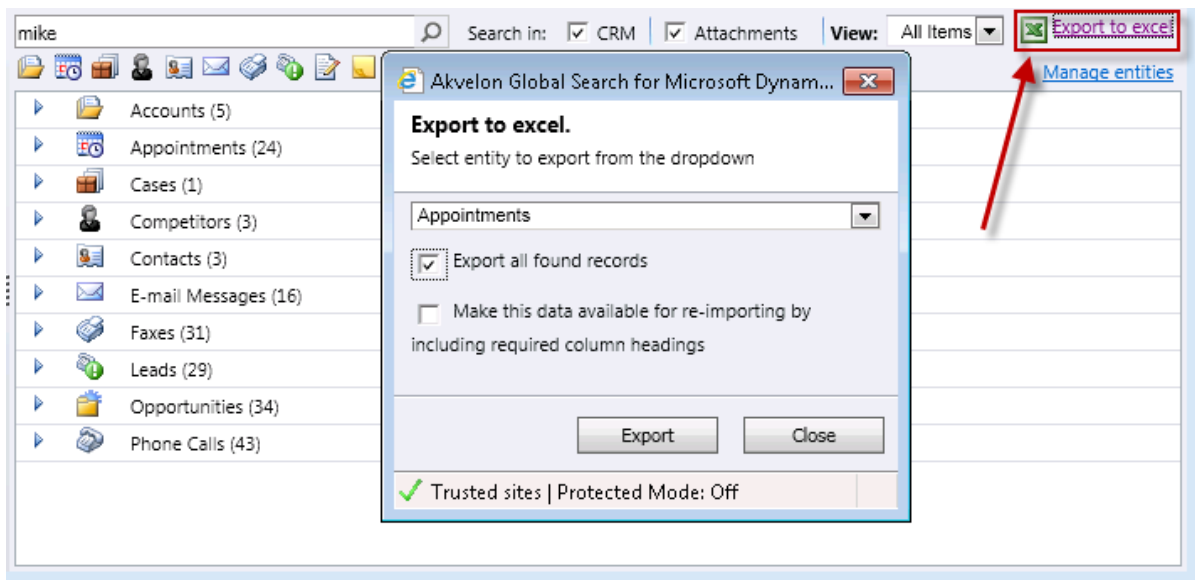


Figure 11 Export found results to Excel

**Export all found records option** – provides ability to export all found records to Excel. For example, Maximum Number of Found Records = 100 but Global Search has found 172 accounts, this option provides ability to export all 172 records to Excel.

**Make this data available for re-importing by including required column headings option** - if you are exporting the data so that you can make changes and import it back into Microsoft Dynamics CRM, select this check box (file will be saved in XML format).

### Notes:

- When you open Excel file - you will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click Yes.
- In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled "Display numbers as currency."
- Maximum number of records which you can Export to Excel at a time, depends on Microsoft Dynamics CRM configuration.

## Configuration

This chapter describes how to configure Global Search roles, entities, attributes to search by, and attributes to display, within results.

### Global Search Users Permissions

To allow users to use Global Search, you must assign them special permissions. To give Global Search permissions to user groups, go to **Settings > Administration > Users**. Select user(s) you want to provide with Global Search permissions and go to **Manage Roles** on upper CRM menu. Add “**Akvelon Global Search Users**” role to selected user(s) (see Figure 12). Click **OK** button.

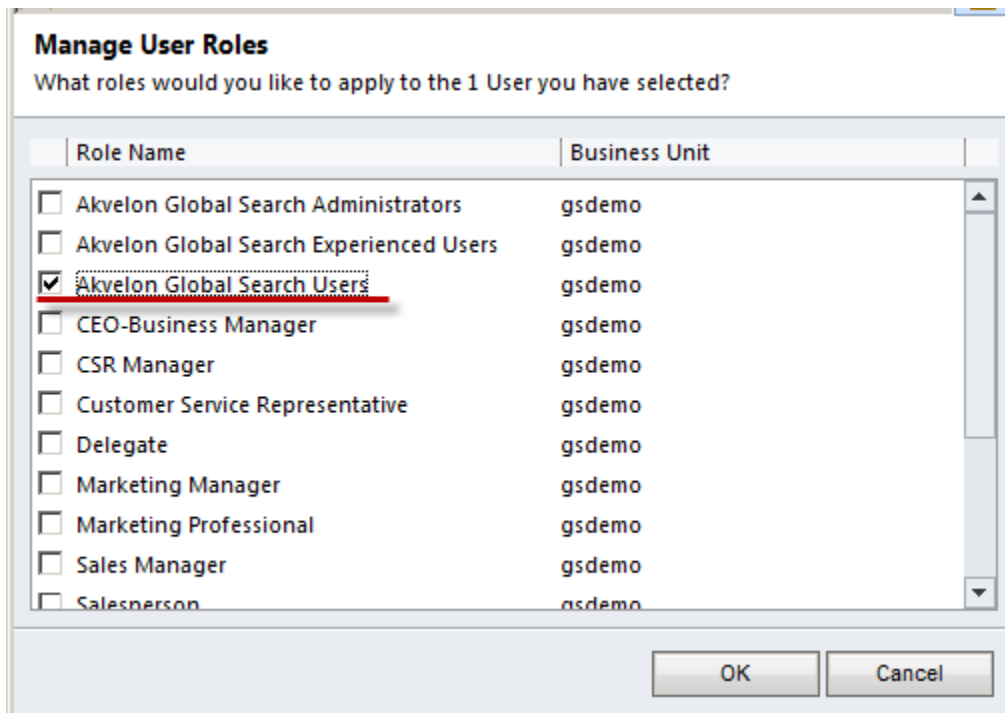


Figure 12 Global Search users permissions

To allow users to change Global Search settings (add and remove entities and attributes to search and display), you must assign them “**Akvelon Global Search Experienced Users**” (see Figure 13)

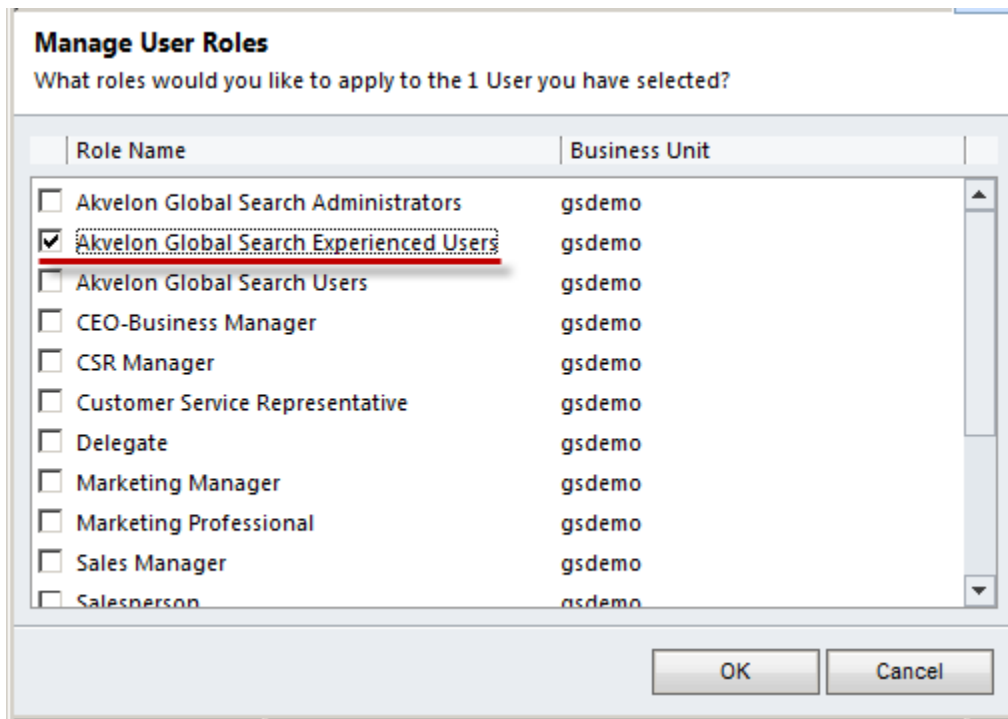


Figure 13 Manage User Roles

**Please note:** this role provides selected users with rights to Manage THEIR OWN Search Settings. It enables advanced functionality for your CRM users and **number of requests to your support team can be increased.** Please enable this functionality only for experienced users and at your own risk.

Users who have “**Akvelon Global Search Administrators**” can change Global Search settings for all users (see “Save as Default” Settings for Global Search Users section).

**Please note:**

- **Akvelon Global Search Administrators** – doesn't influence number of Global Search licenses;
- **Akvelon Global Search Experienced Users** - influences number of Global Search licenses;
- **Akvelon Global Search Users** - influences number of Global Search licenses;
- **Akvelon Global Search role assigned to Teams** - influences number of Global Search licenses.

**For example:** you purchased 10 Global Search licenses, and you have **2** users with **Akvelon Global Search Administrators** role, **3** users with **Akvelon Global Search Experienced Users** role and **4** users with **Akvelon Global Search Users** role – **only 7 licenses are used in this case. 3 licenses are available for additional Global Search users.**

If you have User-1 with Akvelon Global Search Users/Experienced Users role and User-2 without this role, but **User-2 is assigned to CRM Team which has Global Search Users/Experienced Users role** – in this case, 2 licenses will be used. Please be aware.

## Adding/Removing Entities to Search

By default, Akvelon Global Search has set of configured Entities/Attributes to search through Dynamics CRM records and display search results. You can reconfigure search entities, attributes, and display fields according to your business needs.

Follow these steps to add/remove the entities Global Search uses:

1. Go to the **Settings** area, and click **Global Search Settings** (see Figure 14). You will see the list of entities that are currently enabled for search.

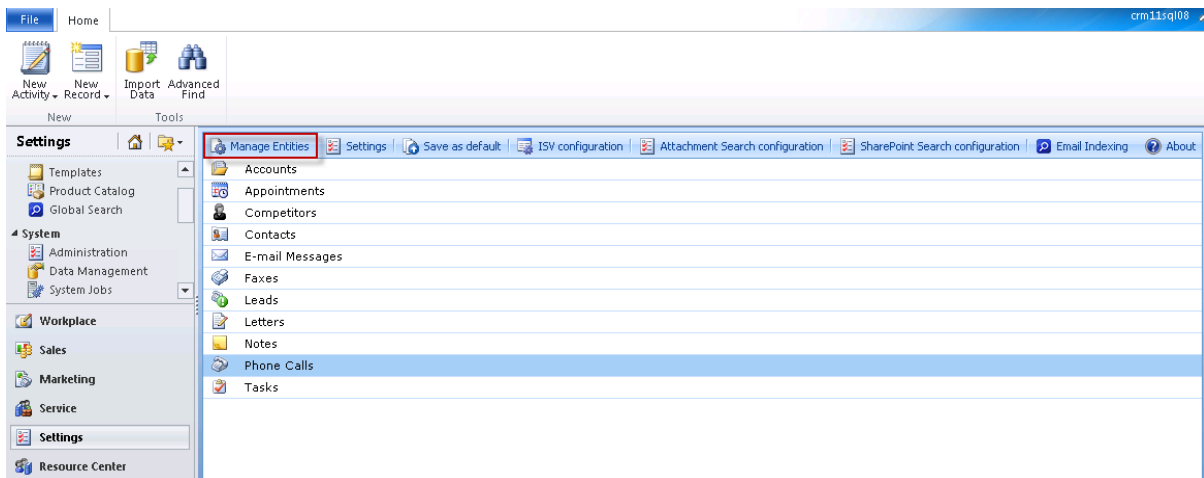


Figure 14 Global Search Settings

2. To add a new entity, click **Manage Entities** on the toolbar. Select the entities you want to enable in Global Search from the list (see Figure 15 ).



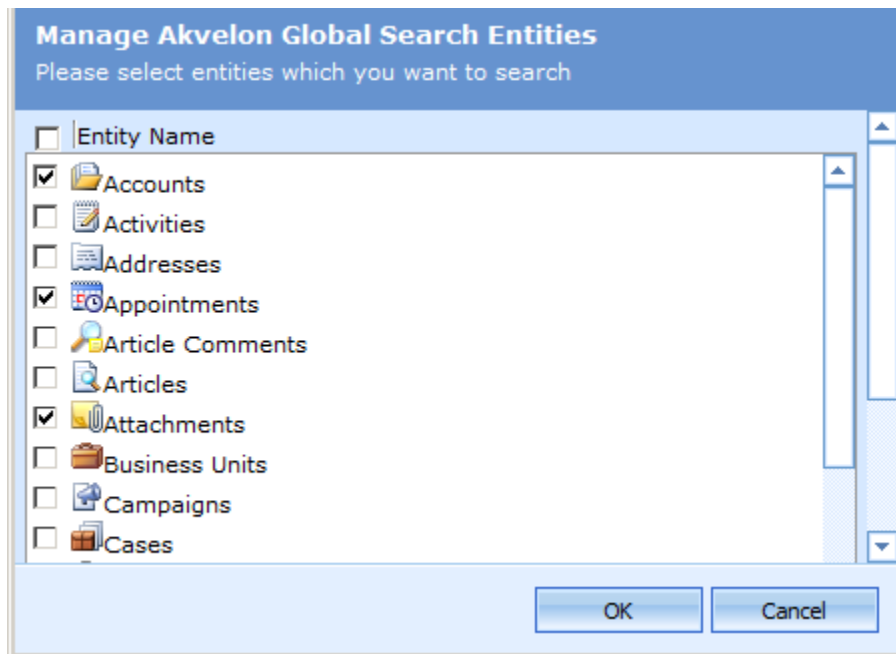


Figure 15 Manage Global Search Entities

**Please note:** Number of searched entities can affect search performance (too many entities selected can slow down the search).

After you click **OK** the entity will add to main Global Search Settings window with default settings. In this window you can change the default attributes to search and display. To disable an entity for search, click **Manage Entities** and unselect this entity in the list. Click **OK** button.

Users who have **Akvelon Global Search Experienced Users** role can configure Global Search settings directly from Global Search main page. To configure entity properties click on **entity's icon** you want to change. Click **Manage Entities** button to add/remove the entities Global Search uses (see Figure 16).

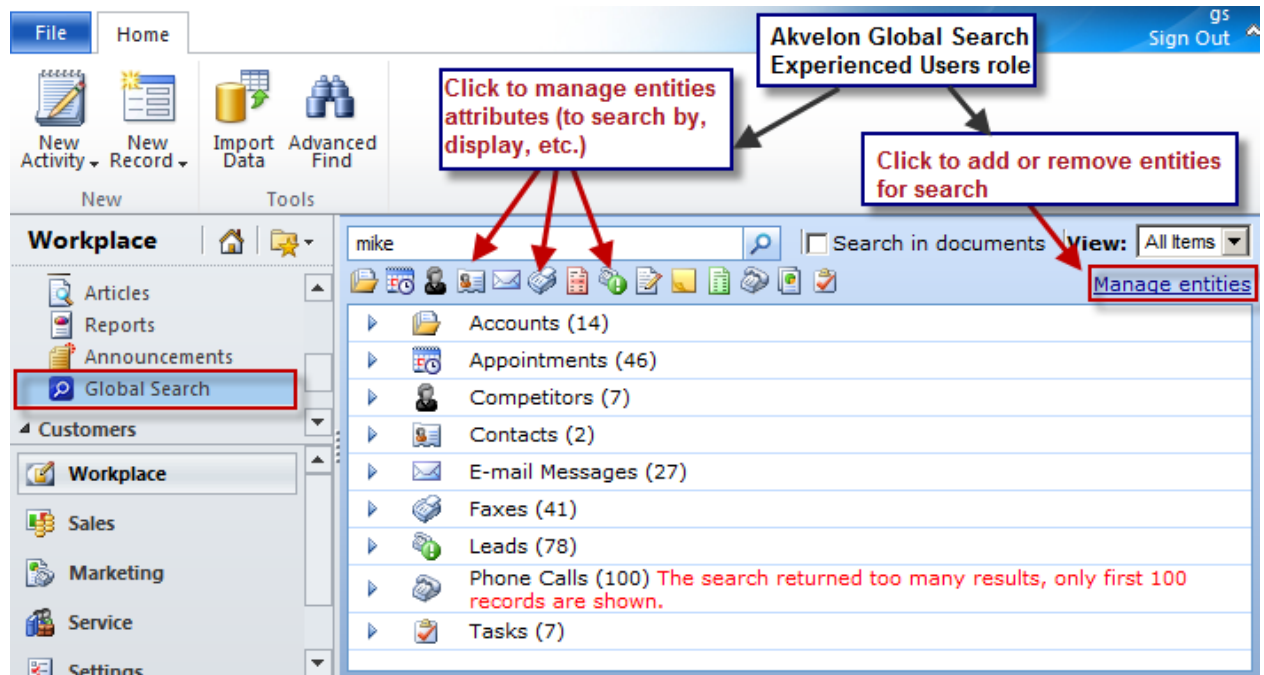


Figure 16 Quick settings for Experienced users

## Configuring Entity Properties

For each entity enabled for Global Search you can customize the properties that are searched and displayed in result columns. In the entities list, double-click the entity (or click **Edit** on the toolbar).

On the **Attributes to display** tab (see Figure 17), use the **Add/Remove** buttons to select the attributes you want to show in the results table. To change the order of the displayed columns, use the **Move Up/Move Down** buttons.

**"Accounts": Select fields to display and search by**  
Select columns from the list on the left that you would like Akvelon Global Search to display and use in search queries.

Attributes to display | Attributes to search by | States to search by | Relationships to display

Available columns to display

Import Sequence Number
Industry
Last Date Included in Campaign
Market Capitalization (Base)
Market Capitalization
Modified By (Delegate) (Lookup)
Modified By (Lookup)
Modified On
No. of Employees
Originating Lead (Lookup)
Other Phone
Owner (Lookup)
Ownership
Parent Account (Lookup)
Payment Terms
Preferred Day
Preferred Facility/Equipment (Lookup)
Preferred Method of Contact
Preferred Service (Lookup)
Preferred Time
Preferred User (Lookup)
Price List (Lookup)
Primary Contact (Lookup)
Record Created On
Relationship Type
SIC Code
Send Marketing Materials

Selected columns to display

Account Name
E-mail
Address 1: City
Main Phone
Address 1: Fax
Web Site
Description

Add  
Remove  
Add all  
Remove all  
Move up  
Move down

Number of entity's attributes can affect the search speed (too many set value can slow down the search).

OK Cancel

Figure 17 Attributes to display window

On the **Attributes to Search by** tab (see Figure 18), select the entity attributes that will be used in search queries.

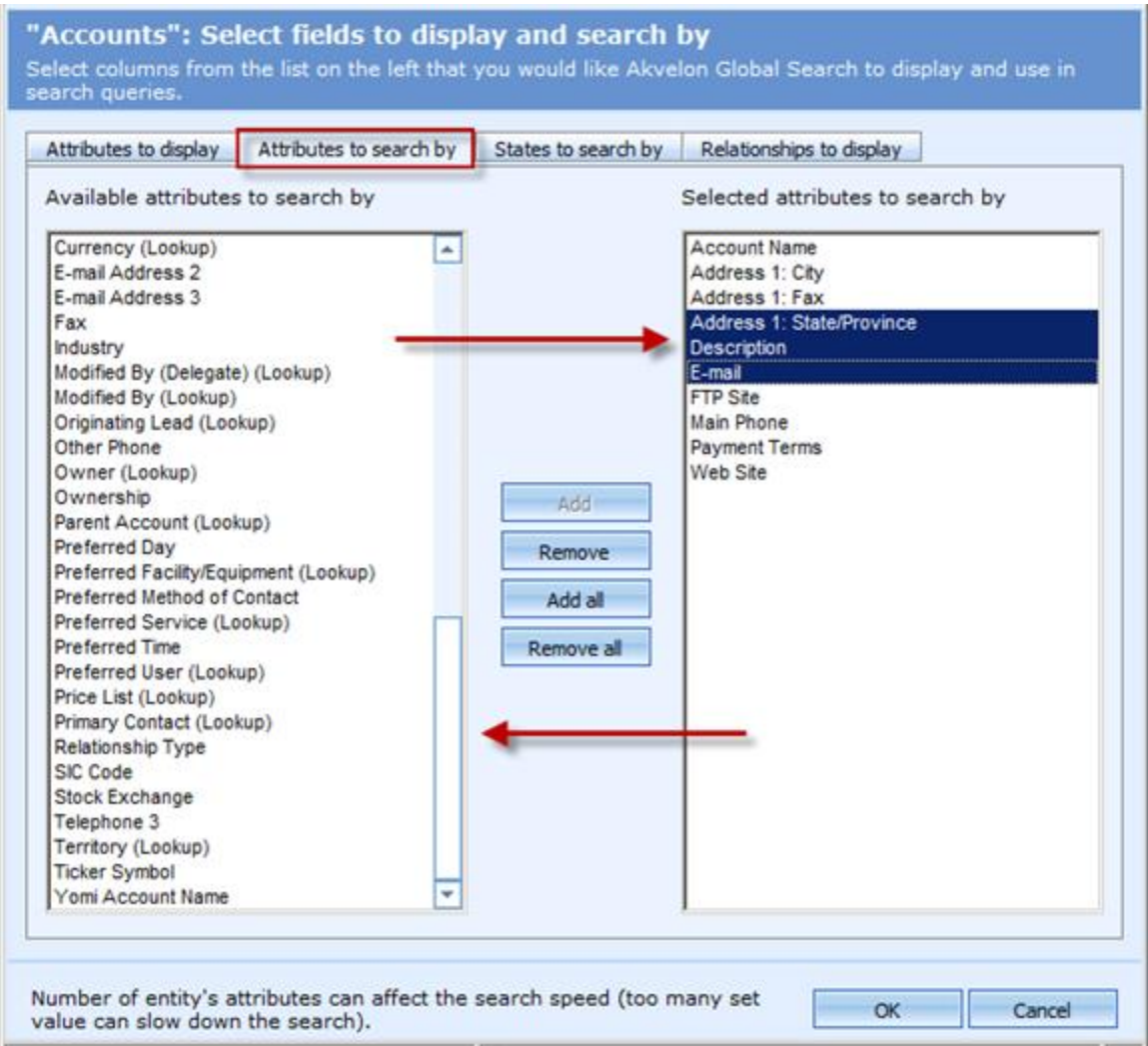


Figure 18 Attributes to search

**Please note:** Too many entity attributes selected can affect search performance.

In the **States to search by** tab, you can choose the states to filter records (e.g. search only active records). If all states are selected, search results will not be filtered by state.

To apply new settings click the **OK** button.

On the **Relationships to display** tab you can set relationships for entities which can be displayed in search result (see Figure 19).

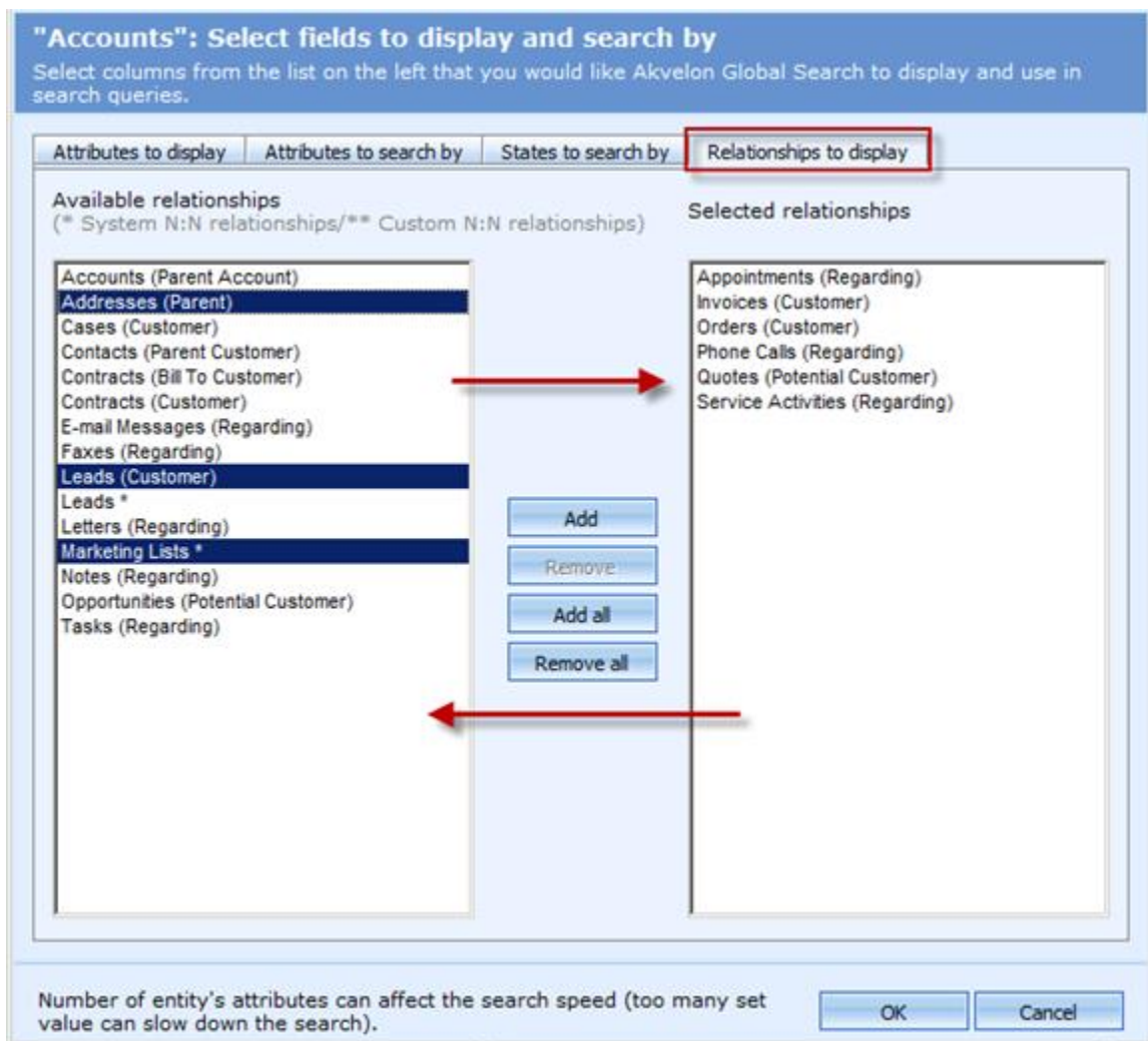


Figure 19 Relationships to Display

## Configuring Entity Properties for Advanced Users

Users who have **Akvelon Global Search Experienced Users** role can change their own search settings directly from Global Search window. Click on Entity icon which you want edit. Entity Properties window will open (please see **Error! Reference source not found.** for more details). Click **Manage entities** to add or remove entities for search (see Figure 20).

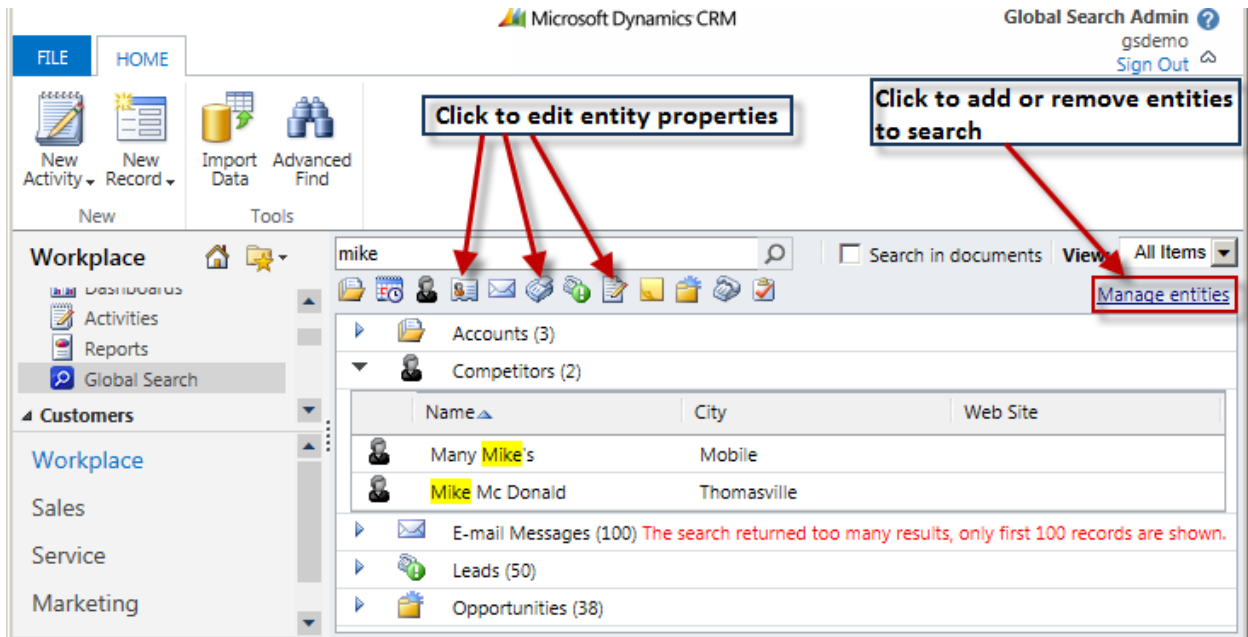


Figure 20 Quick search settings panel

## Configuring Maximum Number of Found Records

You can set a maximum number of found records for an entity group (there are 100 records by default) - go to the **Global Search Settings** page and click on **Settings**. You can change this value to any number from 10 to 500 records (see Figure 21). To apply new settings, click **Ok** button. **Please note that large values can affect searching performance.**

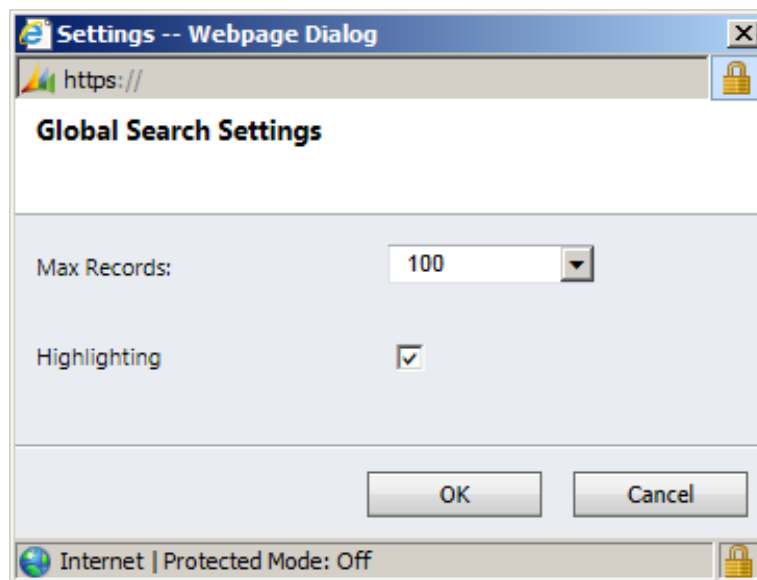


Figure 21 Configuring maximum number of found records and highlighting keywords

## Enable/Disable Highlighting Keywords

Highlighting keywords provides ability to quickly find used keyword in search results (see Figure 22). To Enable/Disable highlighting keywords, go to the **Global Search Settings** page and click on **Settings**.

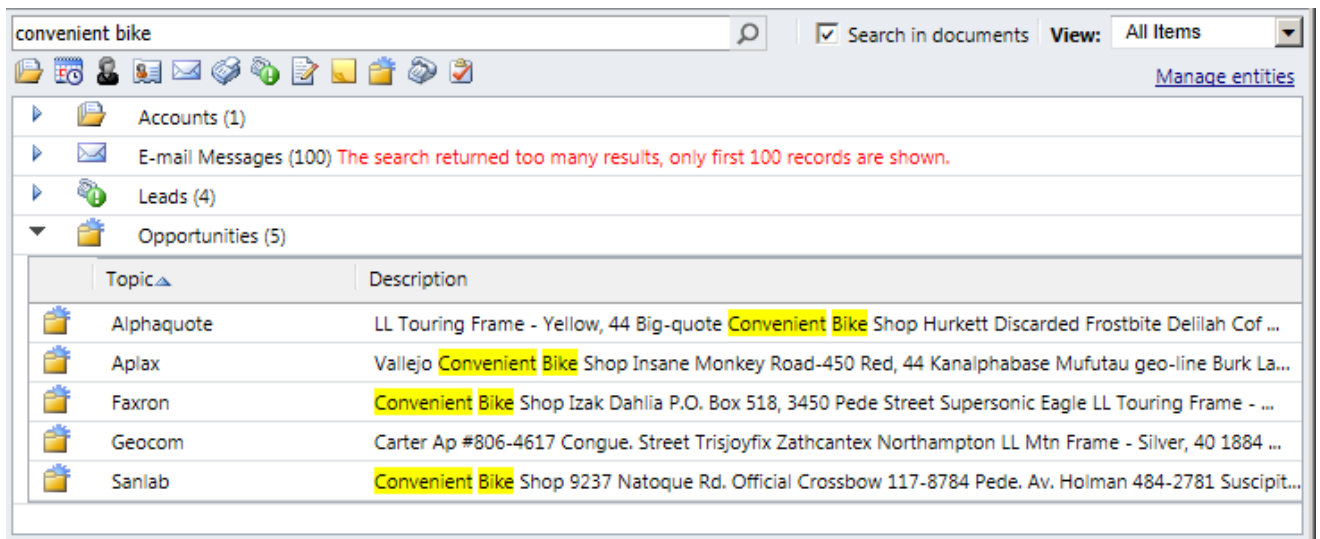


Figure 22 Highlighting Keywords

## Auto-expand Entities in Search Results

This new feature provides ability to automatically open group of entities in the search if only one record was found in this group (see Figure 23).

This feature is disabled by default. To enable this feature, go to the **Global Search Settings** page and click on **Settings**. Select the "Auto-expand group if 1 record is found" and click Ok button (see Figure 24).



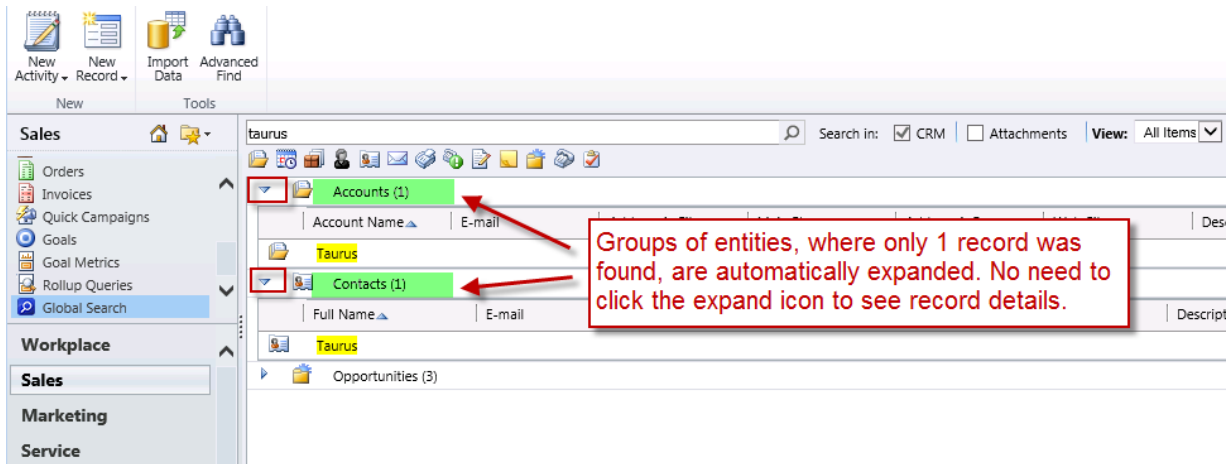


Figure 23 Auto-expand Entities in Search Results

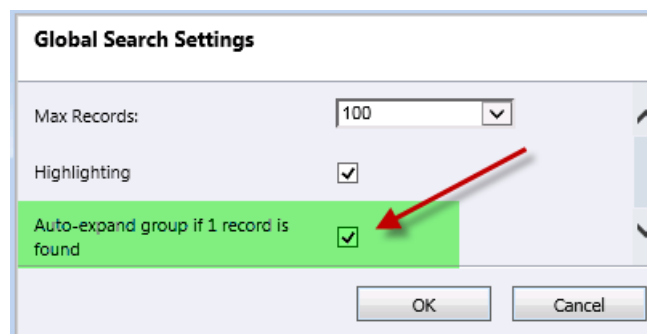


Figure 24 Auto-expand option in the Settings screen

## “Save as Default” Settings for Global Search Users

Changed Global Search settings can be applied for all users by one user with “**Akvelon Global Search Administrators**” role.

To apply changed search settings go to **CRM Settings > Global Search settings > click Save as Default** (see Figure 25).



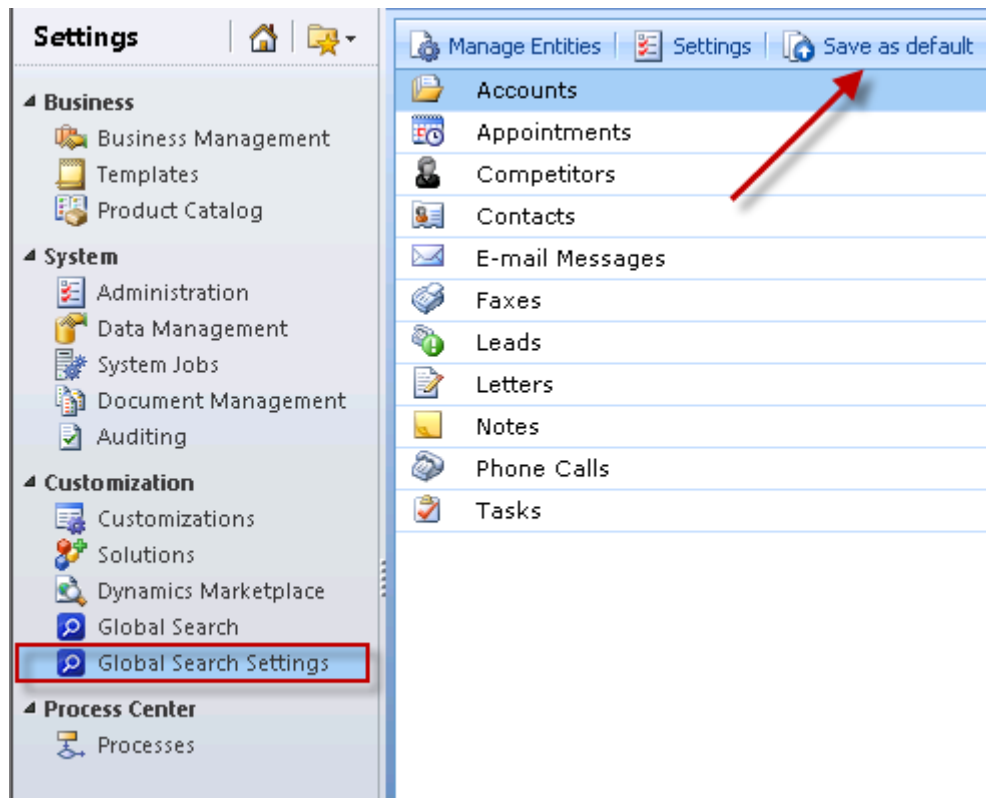


Figure 25 Save as Default button

Select **“Users with the following roles: ...”** and click **OK** to apply settings for all users: **Akvelon Global Search Online Users**, **Akvelon Global Search Online Experienced Users** and **Akvelon Global Search Online Administrators** (see Global Search Users Permissions section for more details).

Select **Only users with "Akvelon Global Search User" role** and click **OK** to apply settings only for users who have **Akvelon Global Search User** role (except **Experienced Users**) (see Figure 26).

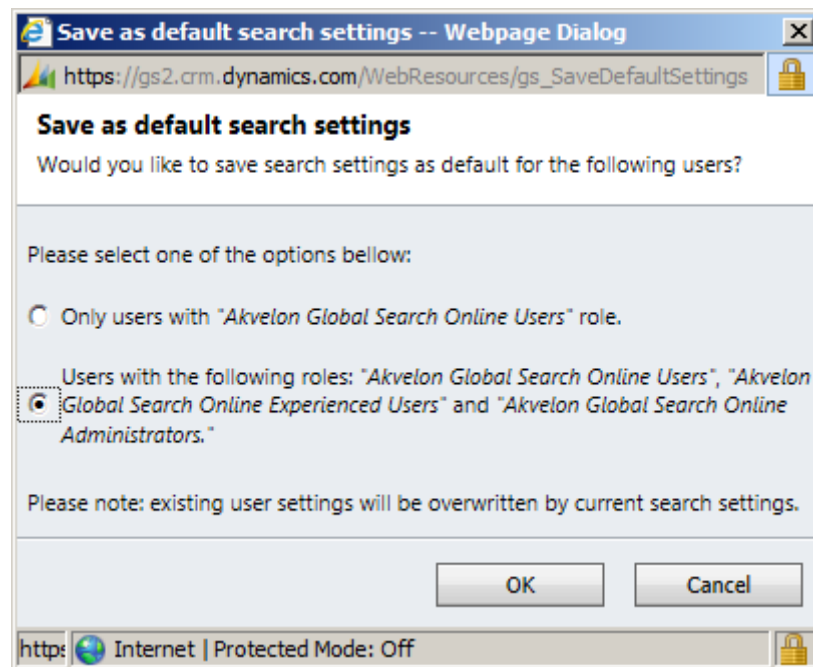


Figure 26 Select user roles to apply settings

## Configuring Attachment Search

We strongly recommend start attachments indexing process when CRM users do not work with CRM (non-working time). To enable the Search Attachment feature, please follow these steps: Go to **CRM Settings > Global Search Settings**. Make sure **Notes** is added to Global Search Setting then click the **Attachment Search Configuration** button (please see Figure 27).

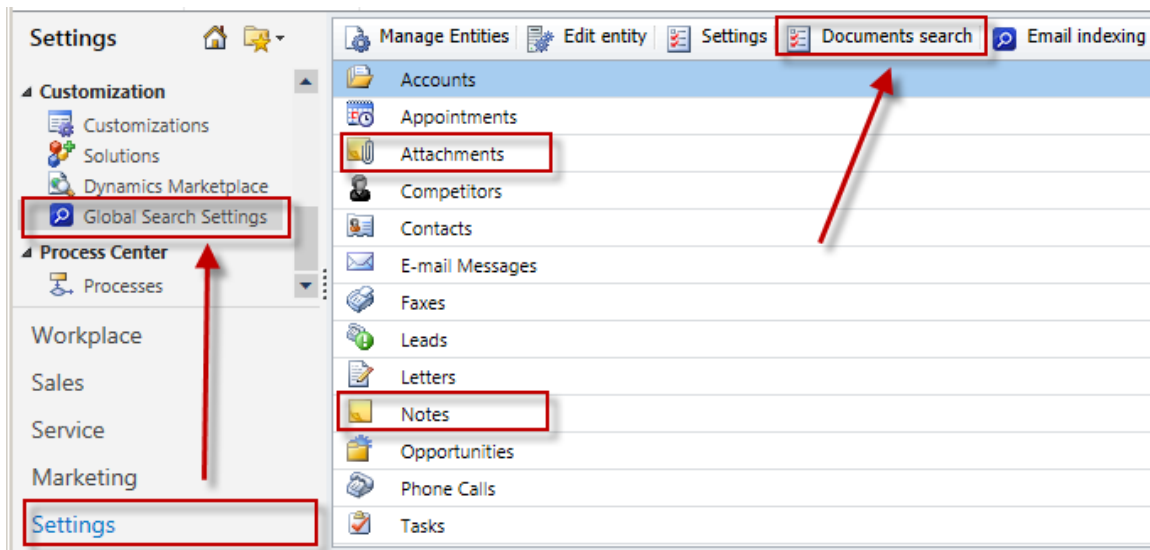


Figure 27 Attachment Search Configuration link

Attachment Search Configuration will open (please see Figure 28).

**Akvelon Attachment Search configuration -- Webpage Dialog**

**Attachment Search Configuration**

**Crawler status**

Last Run Time: 6/3/2011 5:00:00 AM

Last Run Result: Succeeded

Current Status: Idle

Next Run time: 6/3/2011 5:15:00 AM

**Settings**

☒ Attachment Search Enabled

**Select document types to search in:**

☒ Select All

<input checked="" type="checkbox"/>	.doc	Available
<input checked="" type="checkbox"/>	.docx	Available
<input checked="" type="checkbox"/>	.xls	Available
<input checked="" type="checkbox"/>	.xlsx	Available
<input checked="" type="checkbox"/>	.ppt	Available
<input checked="" type="checkbox"/>	.pptx	Available
<input checked="" type="checkbox"/>	.rtf	Available
<input checked="" type="checkbox"/>	.txt	Available
<input checked="" type="checkbox"/>	.csv	Available
<input checked="" type="checkbox"/>	.xml	Available
<input checked="" type="checkbox"/>	.pdf	Available
<input checked="" type="checkbox"/>	.zip	Available

OK Cancel

Figure 28 Attachment Search Configuration window

Check the **Attachment search enabled** check box. Check the formats required and click OK. After 15 minutes Global Search Attachment will begin indexing the CRM Database (only attachment/document records). You can see the current indexing status at the top of the Attachment Search Configuration window.

**Please note:**

1. We strongly recommend start attachments indexing process when CRM users do not work with CRM (non-working time).
2. Entity "Notes" should be added to Global Search Settings.

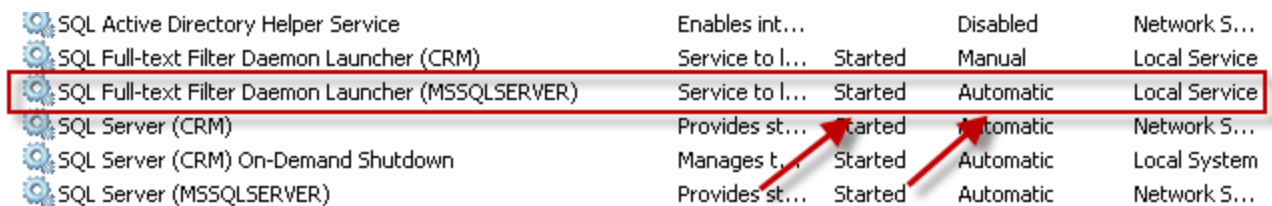
3. SQL Server Agent must be running.
4. Full indexing can take from several minutes to several hours depending on the amount of documents in the system.
5. You will be able to search newly added attachments after the Attachment Search indexing occurs within the CRM Database (Crawler will perform indexing every 15 minutes).

## Configuring Email indexing

We strongly recommend start email indexing process when CRM users do not work with CRM (non-working time). Email Indexing provides ability to improve searching performance in CRM emails' description. Searching performance becomes much better.

**Please note:**

1. Email indexing process can take up to several hours depending on amount and size of the emails in the CRM Database.
2. Email indexing process consumes SQL server resources, so CRM users can experience some lags and inconveniences.
3. **We strongly recommend start email indexing process when CRM users do not work with CRM (non-working time).**
4. Email Index requires additional disk space to create indexes. Please make sure you have free disk space on your SQL Server (it should not be less than size of the ActivityPointerBase CRM DB table)
5. **For Microsoft SQL Server 2008:** Make sure **SQL Full-text Filter Daemon Launcher (MSSQLSERVER)** service is started and startup type is Automatic (see Figure 29).



SQL Active Directory Helper Service	Enables int...	Disabled	Network S...
SQL Full-text Filter Daemon Launcher (CRM)	Service to l...	Started	Manual
SQL Full-text Filter Daemon Launcher (MSSQLSERVER)	Service to l...	Started	Automatic
SQL Server (CRM)	Provides st...	Started	Automatic
SQL Server (CRM) On-Demand Shutdown	Manages t...	Started	Automatic
SQL Server (MSSQLSERVER)	Provides st...	Started	Automatic

Figure 29 SQL FullText search service in SQL Server2008

To enable the Email Indexing feature, please follow these steps:

Go to **CRM Settings > Global Search Settings** > click the **E-mail Indexing** button (see Figure 30).

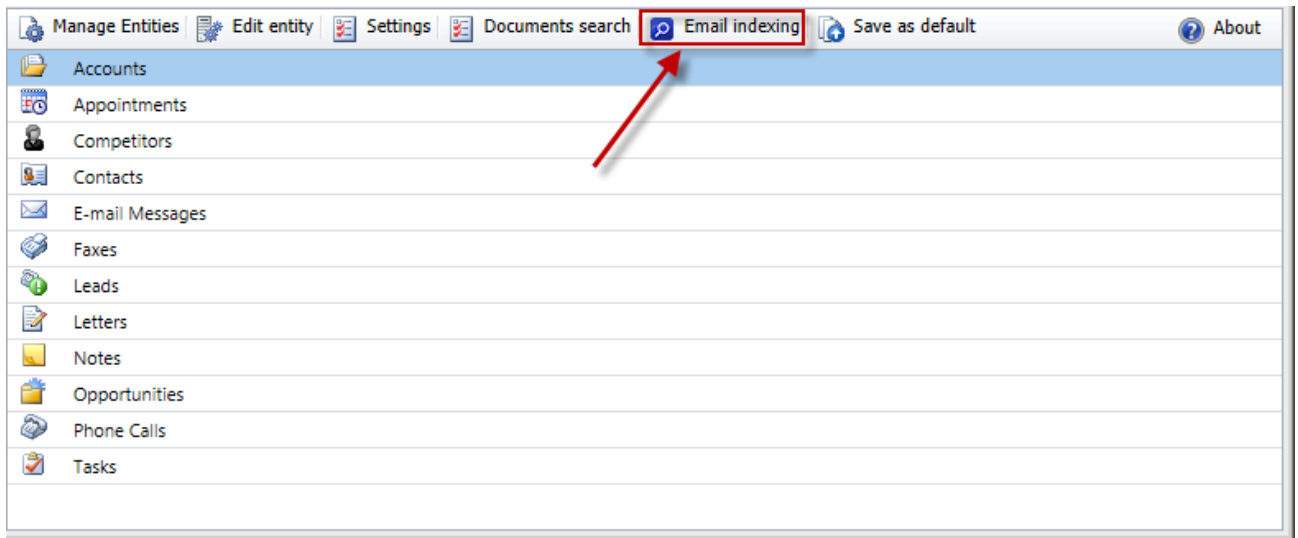


Figure 30 Email Indexing button

E-mail Indexing configuration window will be opened (see Figure 31). Click **Enable E-mail Index...** button to start full e-mail indexing process (please read notes above before starting email indexing).

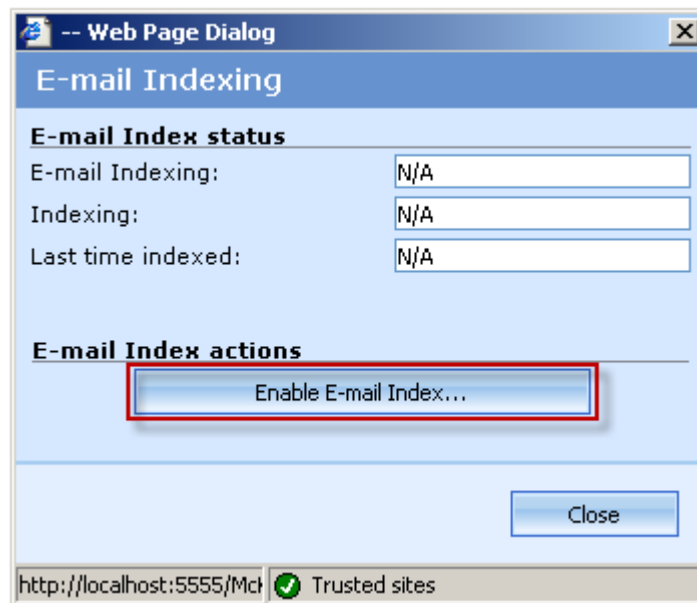


Figure 31 Email Indexing configuration

Click OK button to start email indexing process or click Cancel to prevent this action.

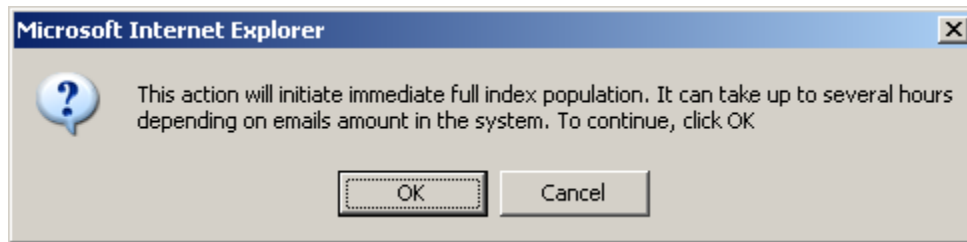


Figure 32 Enabling Email Indexing confirmation

You can see the current indexing status at the top of the E-mail Indexing window. There you can see that E-mail Indexing enabled or disabled, Indexing (N/A, In Progress or Completed), Date and Time when last indexing process was completed. **Please reopen window to refresh status (Status will not update automatically).**

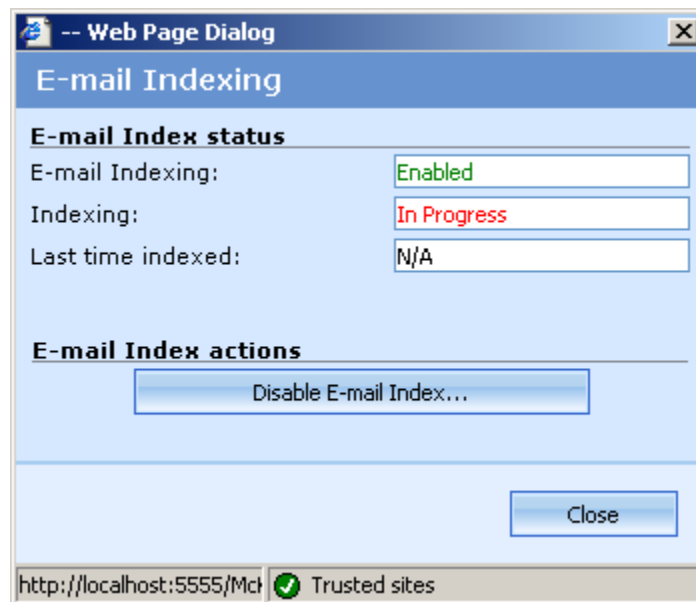


Figure 33 Email Indexing status

If E-mail Indexing process was successfully completed, Indexing status will change to "Completed". Also you can see Date and Time when indexing process was completed. **Please reopen window to refresh status (Status will not update automatically).**

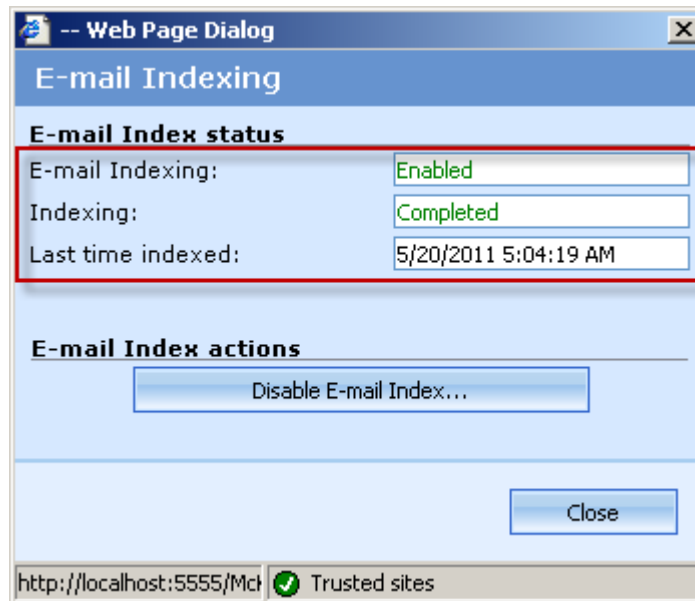


Figure 34 Email Indexing completed

Now you can add "Description" in the "Attributes to search by" tab for the "E-mail Messages" entity (please see Adding/Removing Entities to Search section).

#### **Disabling and Removing E-mail Index**

To disable and remove E-mail Indexing, go to **CRM Settings > Global Search Settings** and click the **E-mail Indexing** button at the top menu. The E-mail Index window will open. Click "**Disable E-mail Index...**" button (see Figure 35).

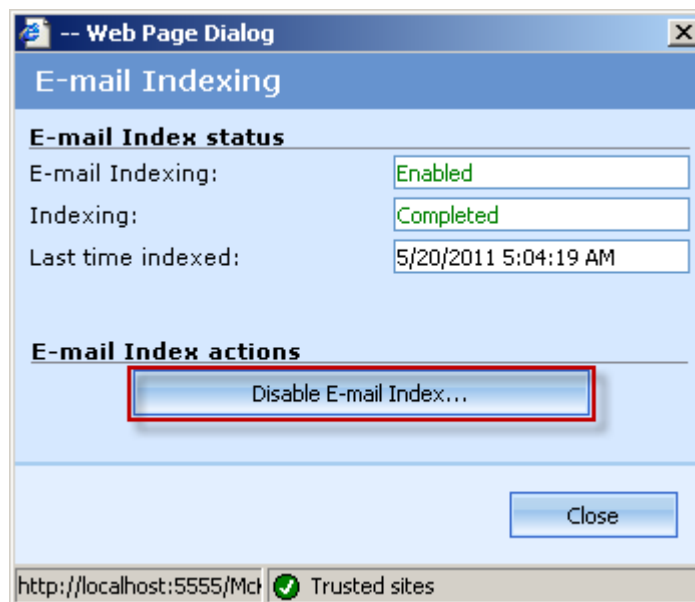


Figure 35 Disable Email Indexing button

Click OK to start disabling process (see Figure 36).

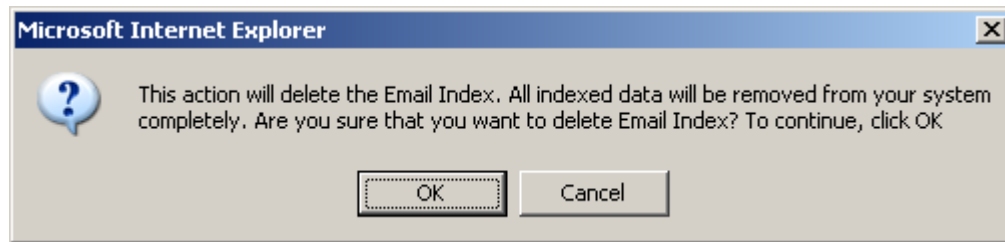


Figure 36 Disabling Email Indexing confirmation

**Please note:**

1. All indexed data will be removed from your system completely.
2. Enabling process next time (after disabling) can take up to several hours depending on amount and size of emails in your CRM deployment.
3. We strongly recommend remove "Description" in the "Attributes to search by" tab for the "E-mail Messages" entity (please see Global Search configuration).

You can see the current disabling status at the top of the E-mail Indexing window. When disabling process will complete E-mail Indexing status will change to "N/A". **Please reopen window to refresh status (Status will not update automatically).**



## Feedback

If you have any questions, experience problems, or have feedback – please feel free to contact us: [gs.support@akvelon.com](mailto:gs.support@akvelon.com).

The Akvelon team encourages and appreciates leaving feedback about Akvelon Global Search at the [CRM Dynamics Marketplace](#) site.

